Scenario

In this lesson, the SHARP trainer, Hall, will show the newly hired Payroll Finance Specialist, Jenny, how to request or download SHARP reports.

Hall

Jenny

Lesson Objectives

After completing this lesson, you will be able to:

- Learn available SHARP report venues
- Find lists of available SHARP reports
- Request agency run reports
- Run WorkCenter queries
- Download centrally run reports using Core FTP Pro

Lesson Topics

In this lesson you will learn about the following topics. Click the **Home** button at lower left corner at any time to return to this menu. Click each topic to navigate to that topic.

Topic 1: Reporting Overview

Topic 2: Agency Run Reports

Topic 3: Centrally Run Reports

Topic 4: Core FTP Pro

Topic 5: Lesson Checkpoint

SHARP Reporting Methods - 1

There are three venues available to obtain SHARP reports:

Agency Run Reports

SHARP contains a variety of standard reports that users can run from their workstations. These reports allow users to obtain information from SHARP when needed. The ability to generate these reports is determined by the user's security roles.

Centrally Run Reports

Centrally Run Reports are created by batch processes and distributed electronically to agency "mailboxes" on the MVS computer system. Agencies can then download their reports from their MVS mailbox. An agency can only access its own reports. Reports in the mailbox can be downloaded to a user's workstation using file transfer protocol (FTP) software. Currently the State's standard software, which agencies can download free from the SHARP Customer Service web site, is Core FTP Pro.

SHARP Reporting Methods - 2

Available centrally run reports and their descriptions can be found in their related CBTs.

WorkCenter Queries

Agencies can also run a number of queries from the Payroll WorkCenter or Time and Labor WorkCenter in SHARP. The ability to access these queries is determined by the user's security roles. You can find detailed instructions on the queries on the SHARP 9.2 Training Resources & Desk Aid page at https://www.admin.ks.gov/offices/personnel-services/sharp1/9-2-training-desk-aids.

Agency Run Reports - 1

Agency run reports are delivered reports that users can run within the SHARP system from their workstations.

A listing of agency run reports, their descriptions, and the path to request them can be found on the SHARP web site at http://da.ks.gov/sharp/reports/default.htm.

The procedures to run an agency run report involve the following steps:

1) Locate the path to request the report from the SHARP report web site mentioned above.
2) Navigate to the report request page in SHARP and enter the Run Control ID for the report.
3) Enter the report request parameters for the report.
4) Specify the server where the report will be run and the report format to be used on the Process Scheduler Request page.

Agency Run Reports - 2

5) Run the report.
6) Access the report from the Process Monitor page.

The procedures to request an agency run report are illustrated as the flowchart below:

Find the path in SHARP to request the report from the report web site at http://da.ks.gov/sharp/reports/default.htm.

→ Navigate to the report request page and enter the Run Control ID for the report.

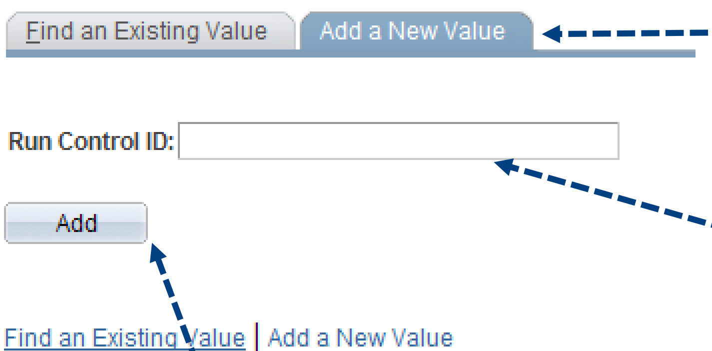
→ Enter the report request parameters.

→ Specify server and report format on the Process Scheduler Request page.

→ Run the report and access the report from the Process Monitor page.

Adding A Run Control ID

A **run control ID** is tied to your user ID to uniquely identify the report process you are running. The run control ID defines the selection criteria and/or **parameters** used to filter report results.



To run the report for the first time, click the Add a New Value tab to add a new Run Control ID.

Run Control ID is limited to 30 characters. Use a name that will help identify the report.

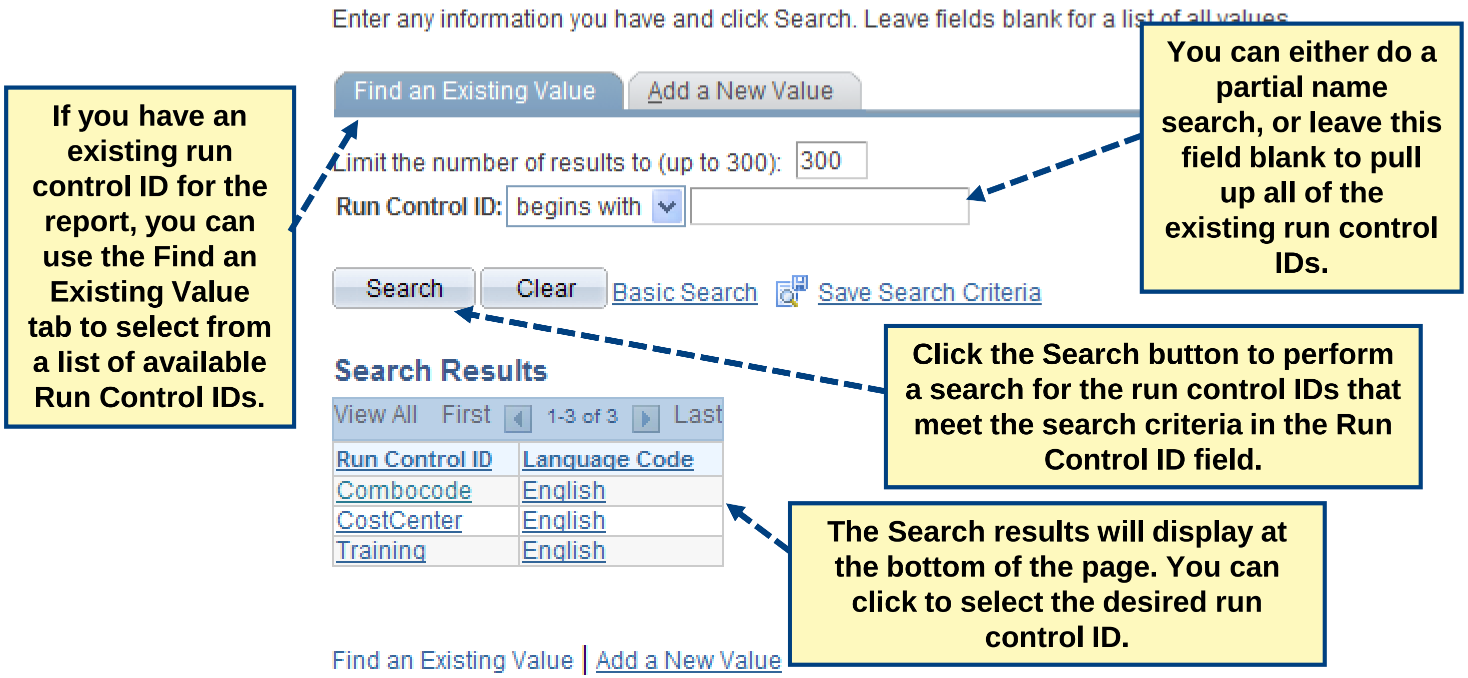
Click the Add button when you are ready to create the Run Control ID.

"Before you can run a report, you must create a run control ID or find an existing run control ID to use."

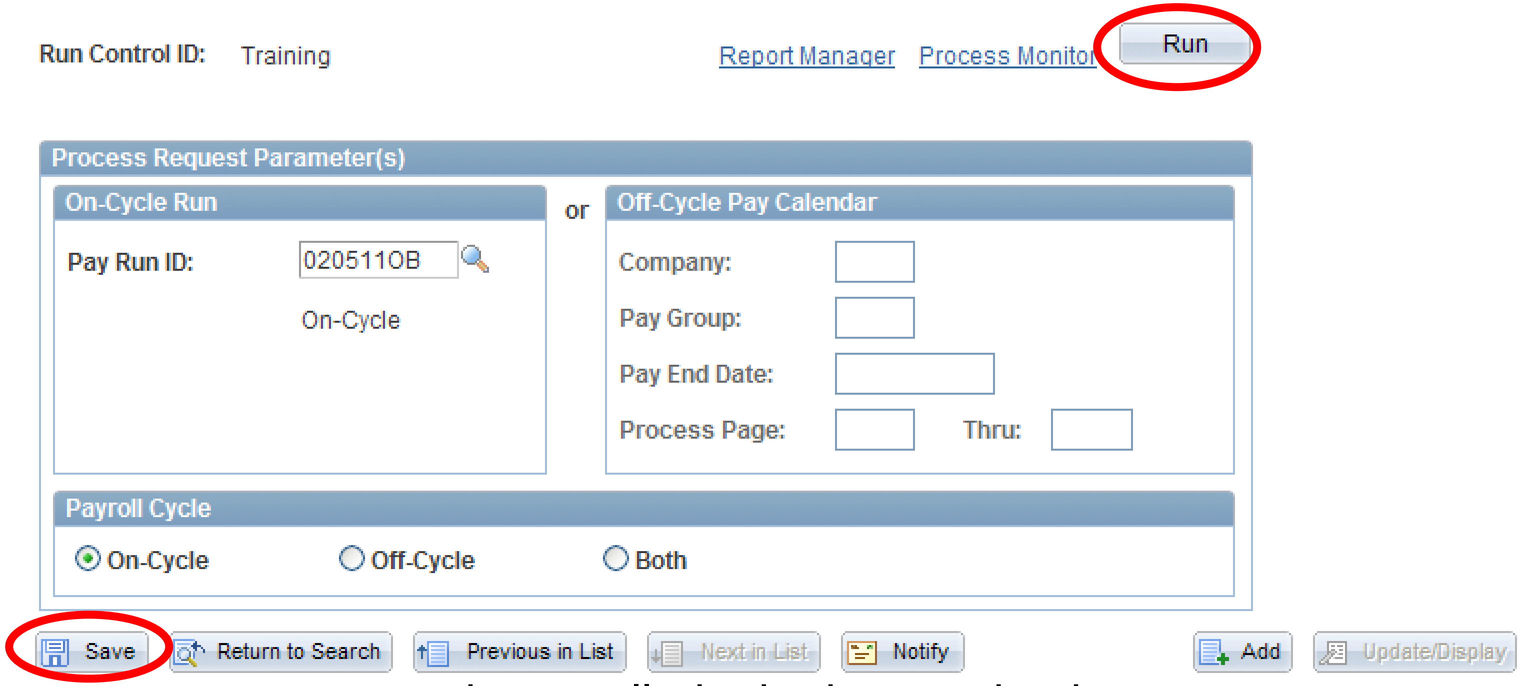
- Hall

Finding an Existing Run Control ID

If you have created a run control ID before, you can reuse it when running reports again. It is recommended that you create a new run control ID for each report you run.

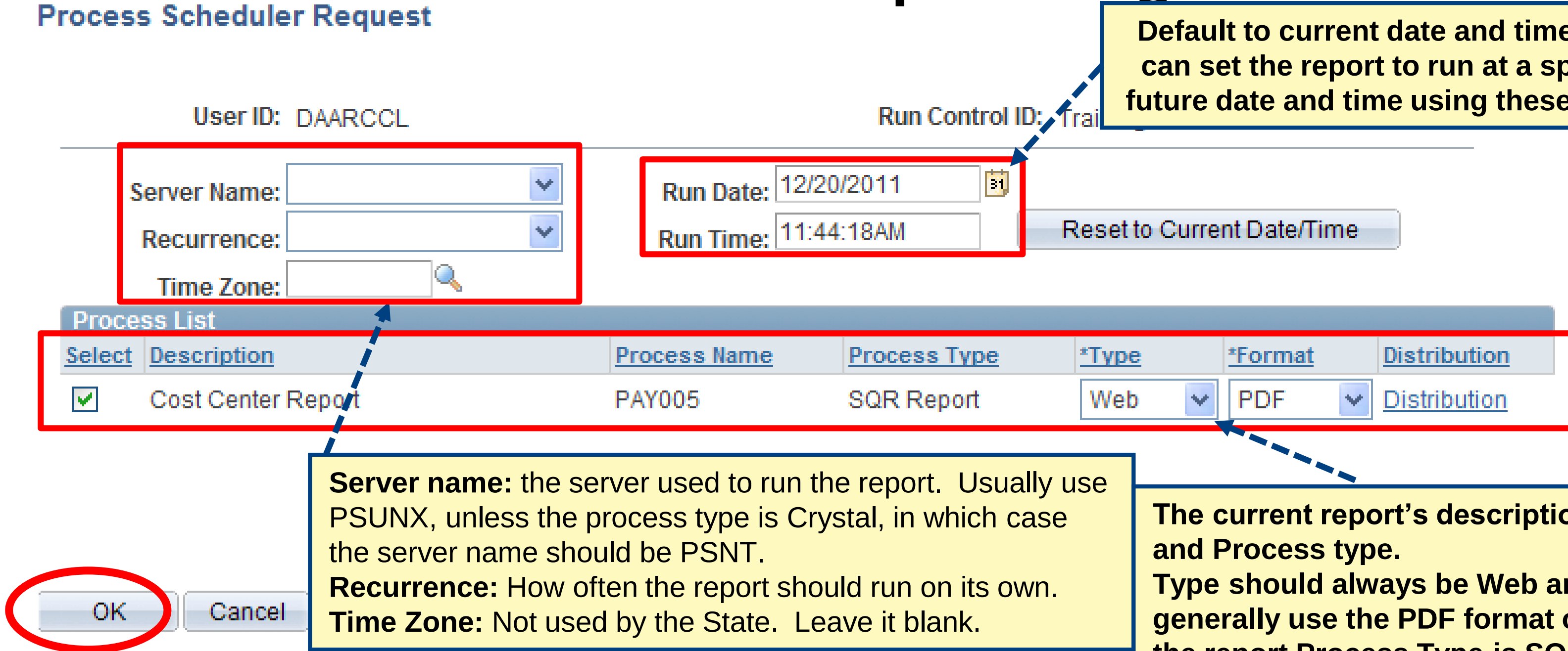


Entering Report Parameters



Parameters, sometimes called criteria, vary by the report you are running. They control what and how data is returned in your report, acting like a filter for your run control ID. When you are done entering parameters, if you want to save the run control ID for future use, click the **Save** button. Then click the **Run** button.

The Process Scheduler Request Page



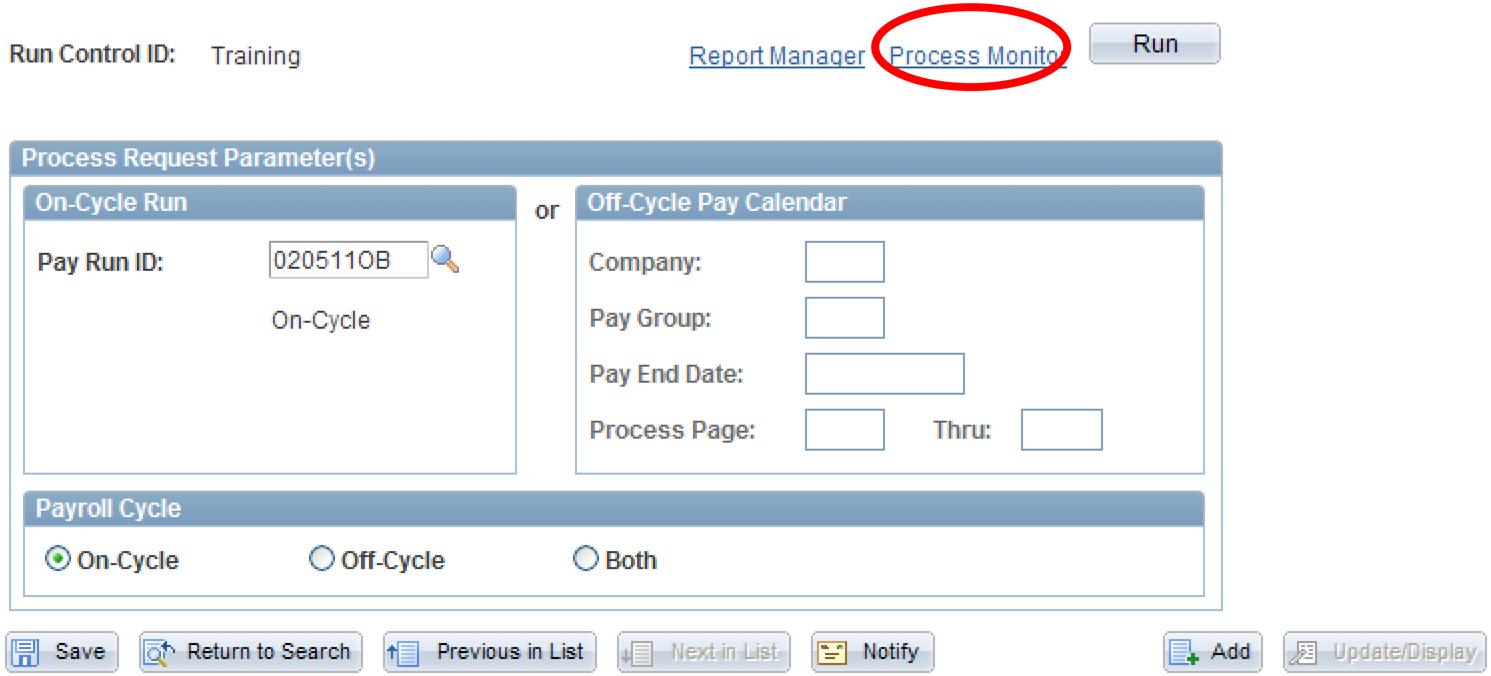
Default to current date and time. You can set the report to run at a specific future date and time using these fields.

Server name: the server used to run the report. Usually use PSUNX, unless the process type is Crystal, in which case the server name should be PSNT.
Recurrence: How often the report should run on its own.
Time Zone: Not used by the State. Leave it blank.

The current report's description, name, and Process type.
Type should always be Web and generally use the PDF format option if the report Process Type is SQR.

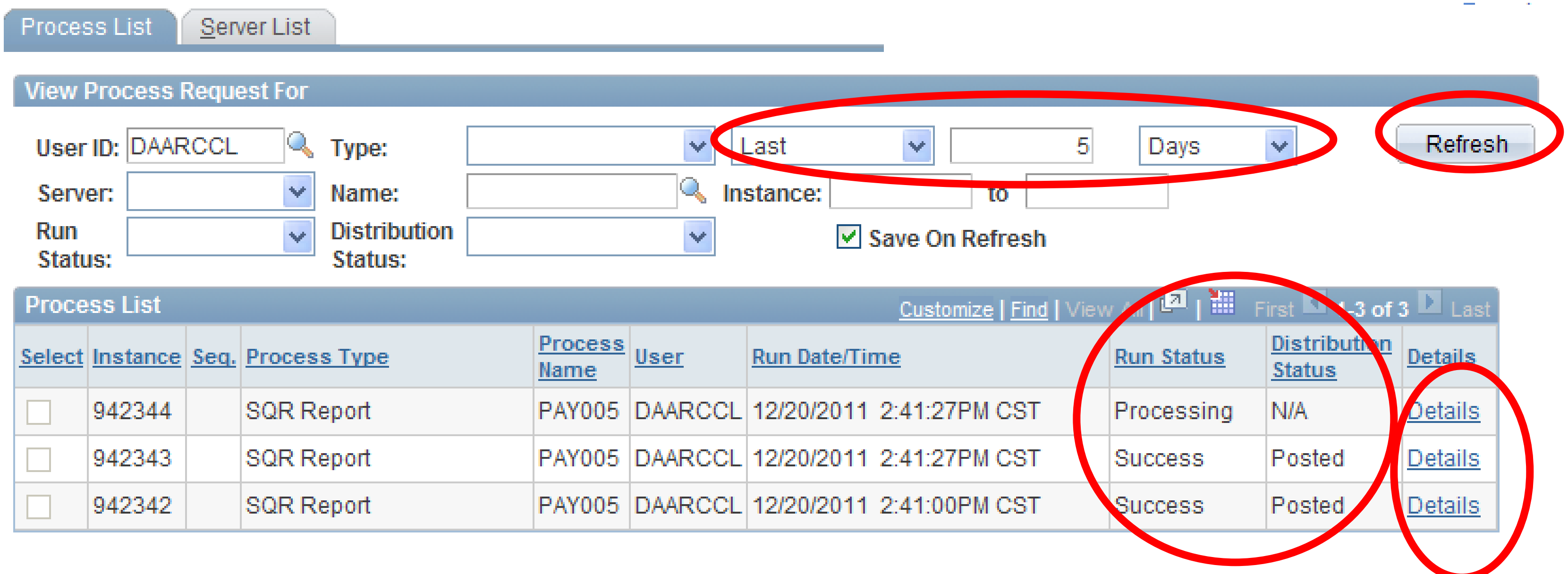
After clicking the Run button, the system will take you to the Process Scheduler Request page, where you can select the server and specify the report format.
You would click **OK** when you are ready to run the report.

Accessing The Process Monitor Page



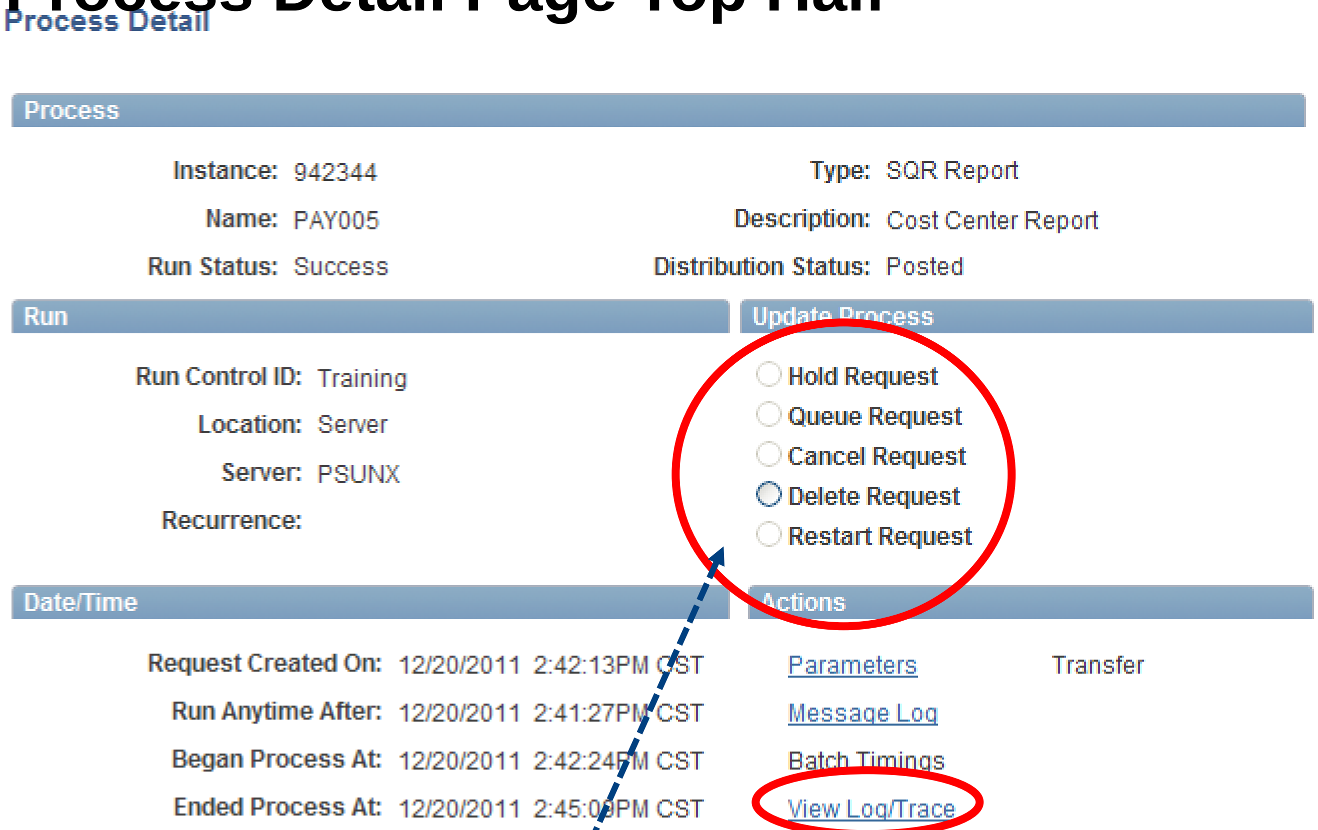
After clicking OK, the system will return you to the Process Request Parameters page. This time you will click on the Process Monitor link to monitor the report run status.

The Process Monitor Page



You can use the Last _Days field to limit the number of reports shown. Use the **Refresh** button to update the report's Run Status and Distribution Status. When the report status is **Success** and **Posted**, click on the **Details** link to access the report.

❑ The Process Detail Page Top Half



You can change the report request run option. Clicking the ViewLog/Trace link will take you to the report output you chose in the Process Scheduler.

The Process Detail Page Bottom Half

View Log/Trace

Report

Report ID: 247192 **Process Instance:** 942344 Message Log

Name: PAY005 **Process Type:** SQR Report

Run Status: Success

Cost Center Report

Distribution Details

Distribution Node: HRDEV91UNIX **Expiration Date:** 12/27/2011

File List

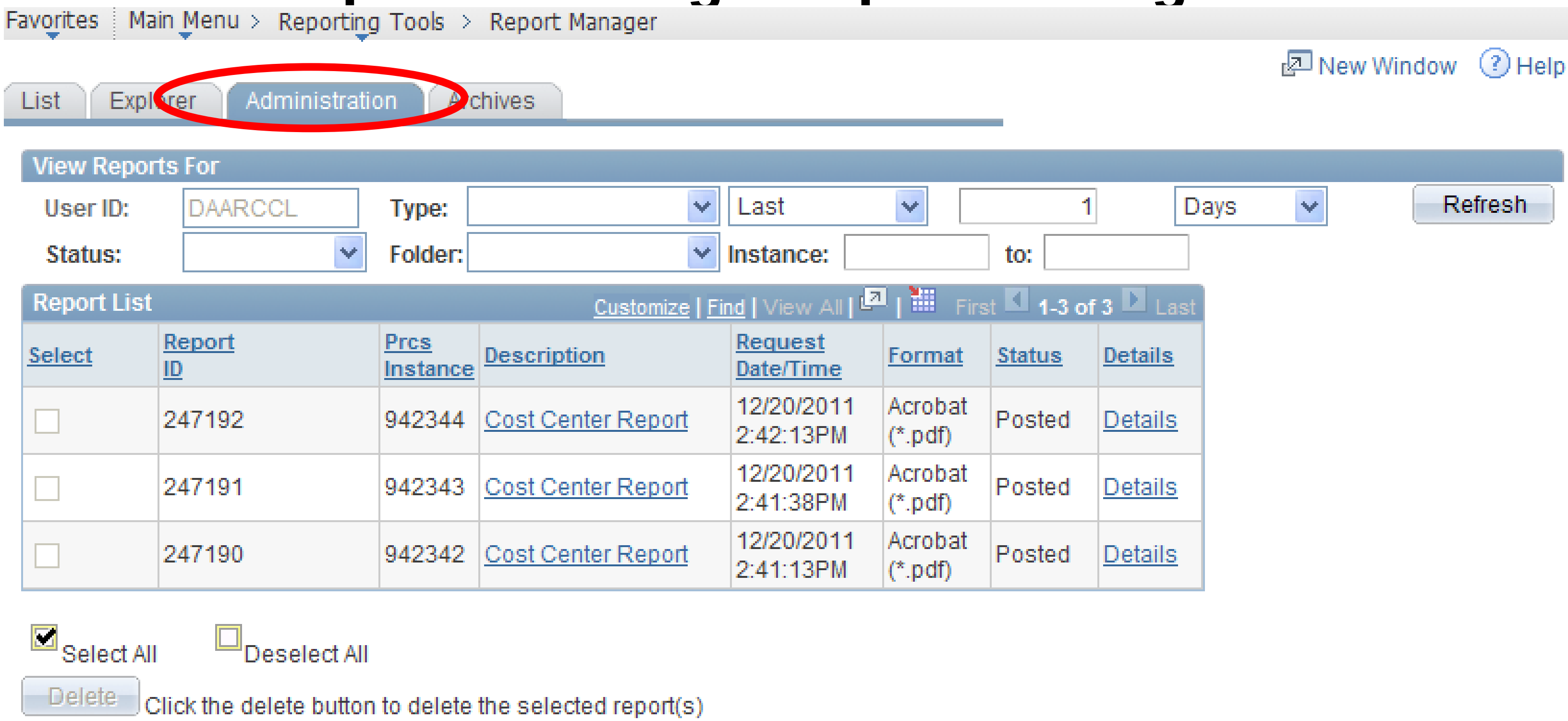
Name	File Size (bytes)	Datetime Created
SQR_PAY005_942344.log	1,568	12/20/2011 2:45:09.276118PM CST
pay005_942344.PDF	12,963,696	12/20/2011 2:45:09.276118PM CST
pay005_942344.out	89	12/20/2011 2:45:09.276118PM CST

Distribute To

Distribution ID Type	*Distribution ID
User	DAARCCL

Click on the .PDF file to access the report for reviewing or saving to a location you choose.

Access Reports Through Report Manager



Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
	247192	942344	Cost Center Report	12/20/2011 2:42:13PM	Acrobat (*.pdf)	Posted	Details
	247191	942343	Cost Center Report	12/20/2011 2:41:38PM	Acrobat (*.pdf)	Posted	Details
	247190	942342	Cost Center Report	12/20/2011 2:41:13PM	Acrobat (*.pdf)	Posted	Details

You can also access or delete the completed reports before they are purged from the system through the **Administration** tab on the Report Manager page using the following path: ***Main Menu>Reporting Tools>Report Manager***.

Centrally Run Reports Overview - 1

Centrally run reports are created by batch processes and distributed electronically to agency "mailboxes" on the MVS computer system. An agency can only access its own reports. Reports in the MVS mailbox can be downloaded to a user's workstation using file transfer protocol (FTP) software.

Agencies can use their current FTP software. For agencies that need FTP software or wish to change, the Department of Administration recommends Core FTP Pro which is provided free to agencies by the Department of Administration. This software can be downloaded from the SHARP web page located at http://www.da.ks.gov/sharp/downloads.htm. **To use Core FTP Pro for the first time, agencies should contact the Office of Information Technology Services at 785 296 4999 for software registration and set up instructions.**

Centrally Run Reports Overview - 2

You can request access to the MVS mailbox through your agency TopSecret administrator if one is designated in your agency. For agencies that rely on Department of Administration for their technical support, users should contact OITS at 785-296-4999 to request a form and instructions on where to submit it.

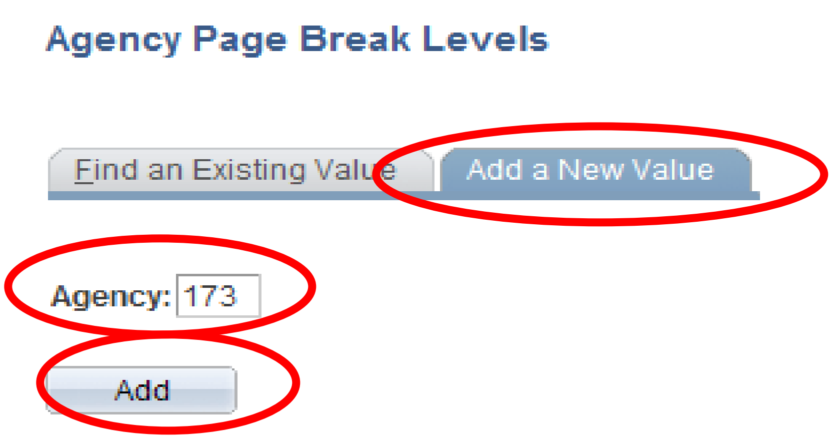
Reports are created in both .lis and PDF formats. Reports in PDF format require Adobe Acrobat Reader software to view or print the reports. The PDF format is used by most agencies. The .lis format is used by a few agencies due to internal requirements.

A report remains in the MVS mailbox for 30 days and is then deleted. You should make sure to copy the reports from the MVS mailbox to your workstation before they are deleted.

Report Page Break Levels - 1

Agencies can control how their centrally run reports page break by setting up page break levels for different reports. The full path to the Agency Page Break Levels page is:

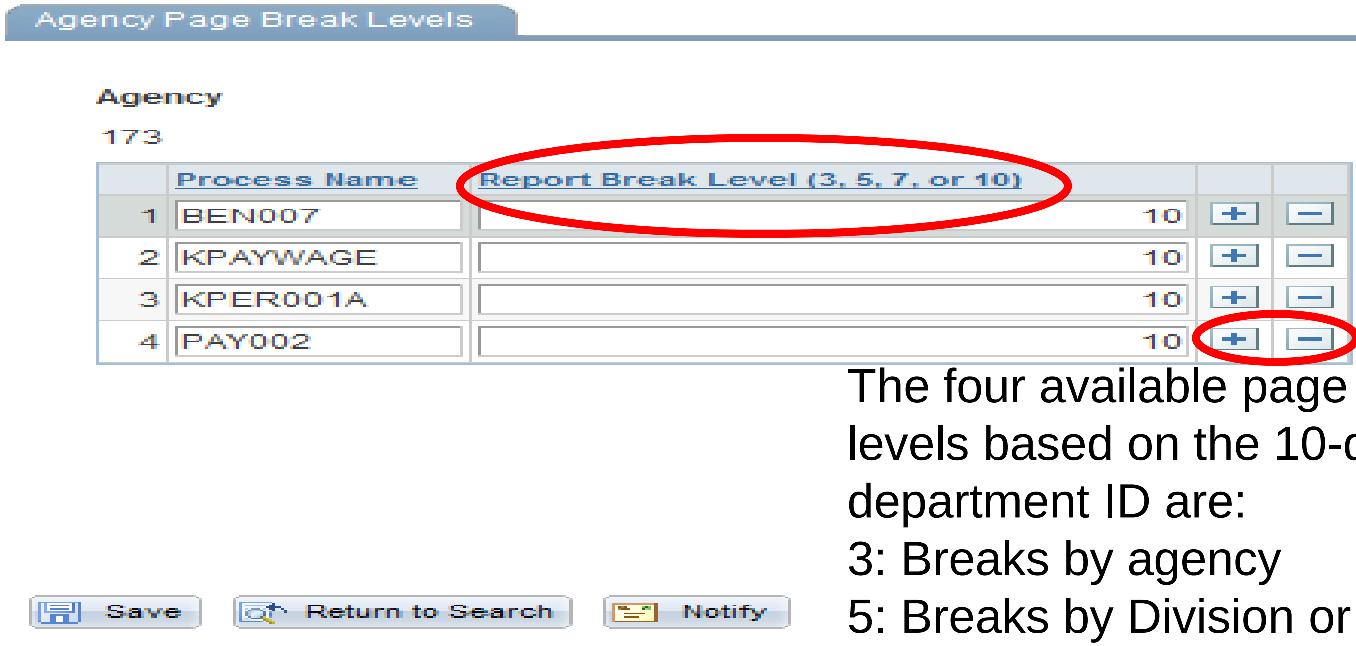
Main Menu>Set Up HRMS>Foundation Tables>Organization>Agency Page Break levels



To add Agency Page Break Levels for the first time, click the **Add a New Value** tab, type **your 3-digit agency number** in the Agency field, then click **Add**.

You can also search your existing Agency page Break Levels using your agency number.

Report Page Break Levels - 2



The four available page break levels based on the 10-digit department ID are:

3: Breaks by agency

5: Breaks by Division or Bureau

7: Breaks by section

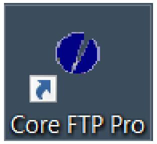
10: Breaks by unit

Use the Add Row/Delete Row button to add/delete a report.

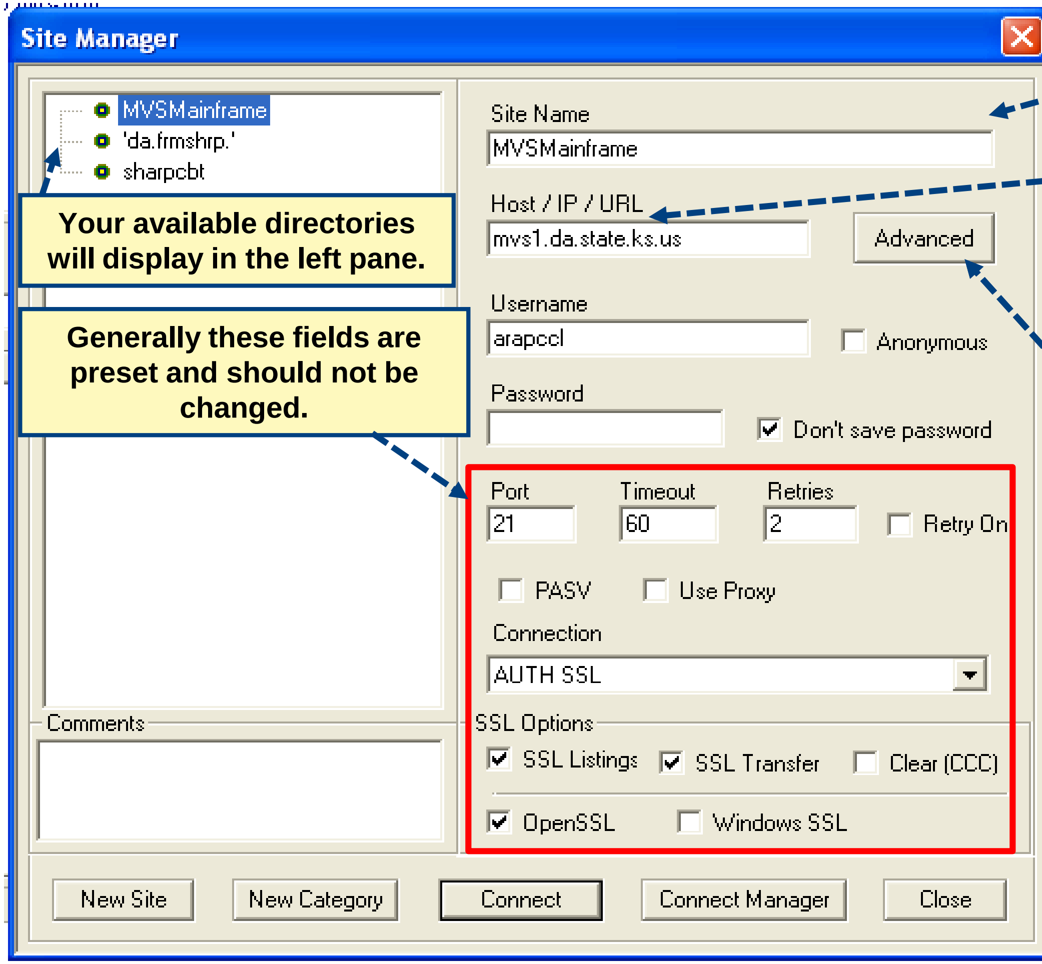
Introduction to Core FTP Pro - 1

When using Core FTP Pro for the first time, agencies should contact the Office of Information Technology Services at 785 296 4999 for software registration and set up instructions.

After the installation, usually you can find your Core FTP Pro icon on your desktop. Double click the icon to start the program.



Introduction to Core FTP Pro - 2



Your available directories will display in the left pane.

Generally these fields are preset and should not be changed.

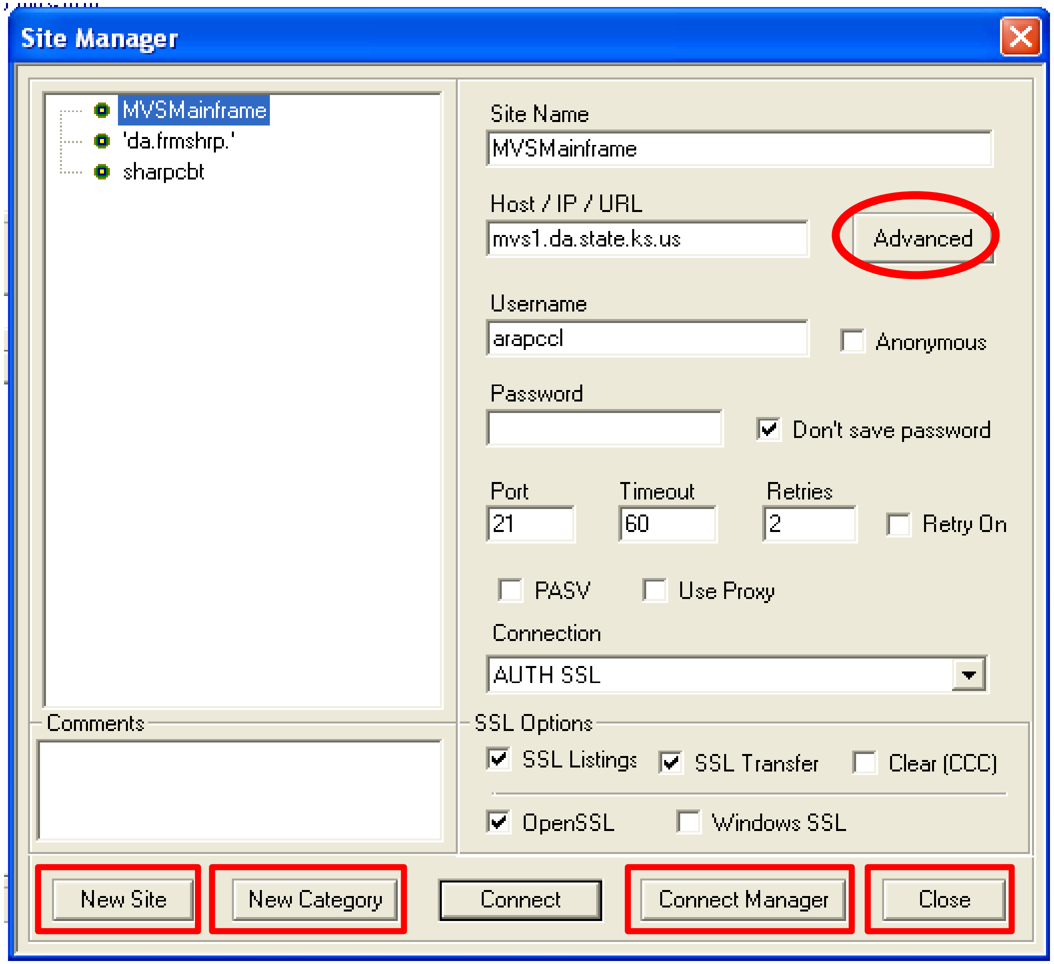
The remote site name. Must be “MVSMainframe” for the MVS mail box access.

Use the MVS URL name “mvs1.da.state.ks.us”. It this doesn’t work, use the IP address “165.201.25.2”.

Clicking the Advanced button will take you to the Advanced Site Settings page where you can change the Directory/folder. The page will be discussed in detail later.

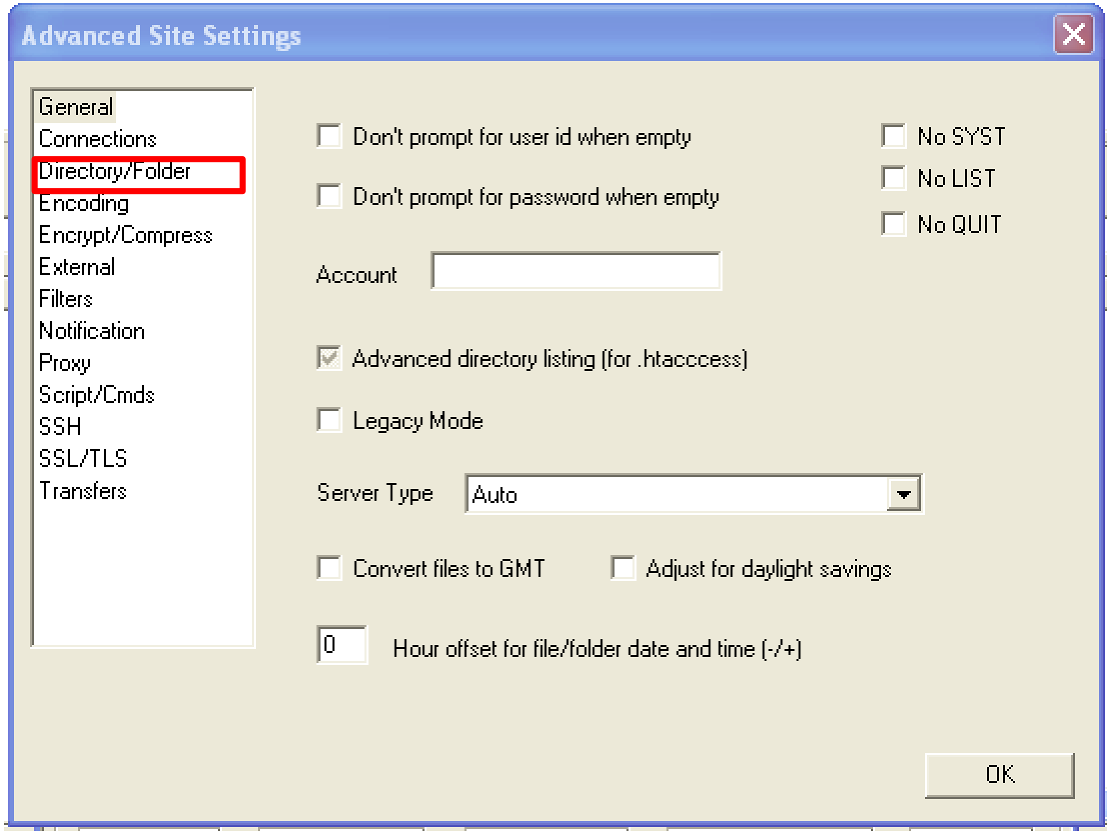
The Site Manager dialog box displays when you open the Core FTP Pro software. Usually most fields are preset. All you have to do is type in your **password** and click the **Connect** button.

Introduction to Core FTP Pro - 3



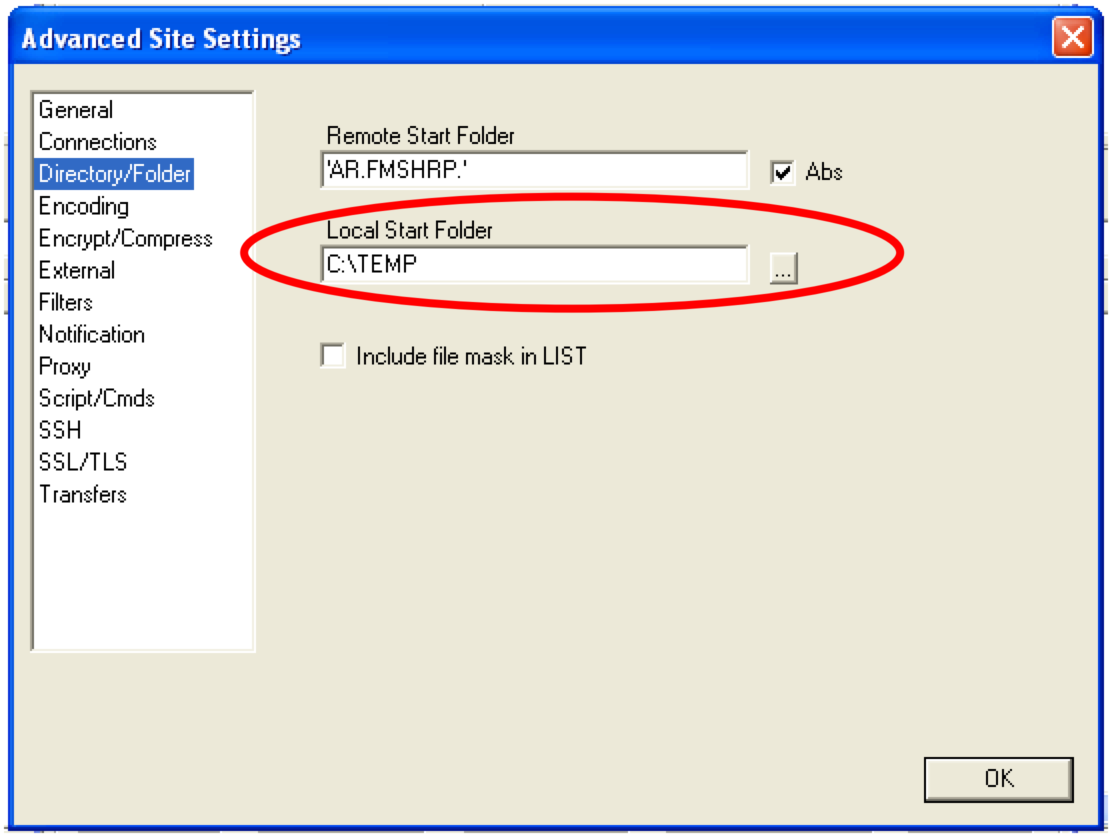
If you use Core FTP Pro to transfer files from other sites, click the New Site button to add a new site. The New Category and Connect Manager buttons are not used. Use the Close button to close the program. Clicking the Advanced button will take you to the Advanced Site Settings page where you can change the Directory/folder. The page will be discussed in detail next.

Introduction to Core FTP Pro - 4



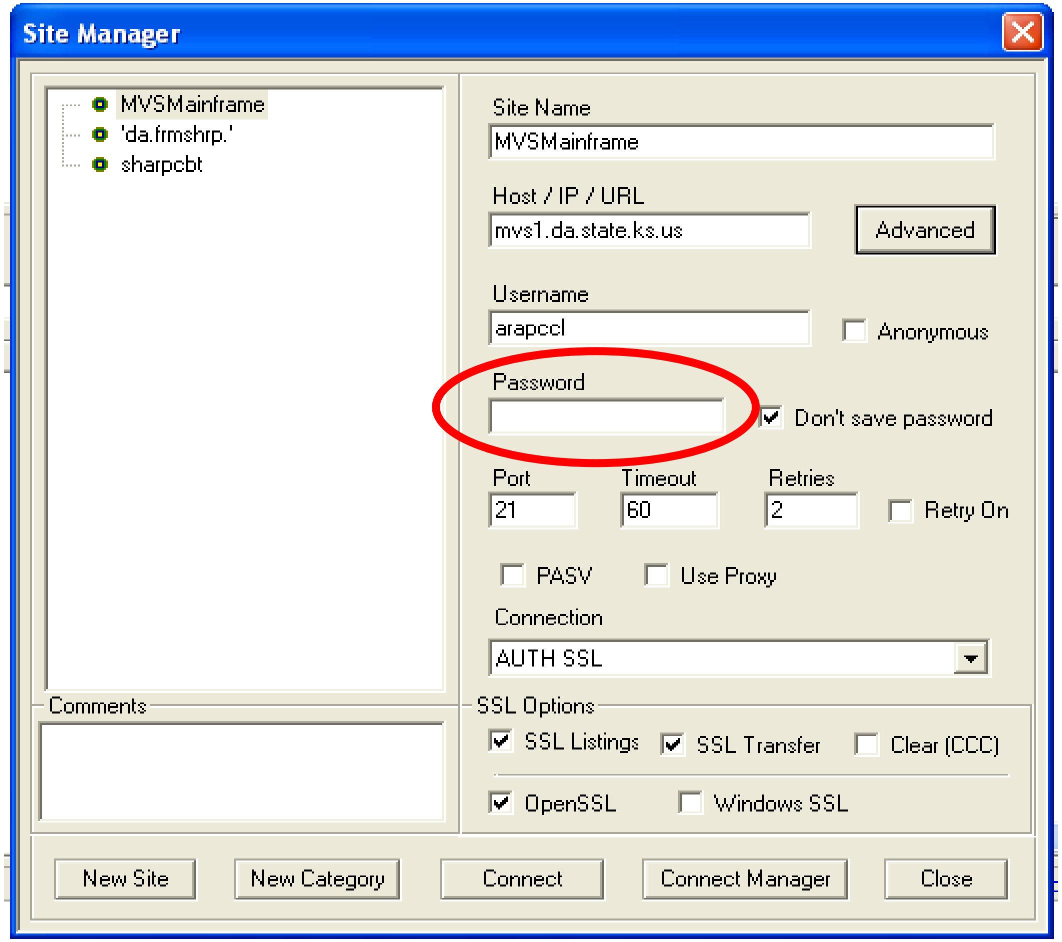
Normally you would not need to use the Advanced Site Settings page. The values for most fields are set up by your technical staff according to the mainframe/server specification and should not be changed. You only need to use this page when you want to change your local directory. You would click the **Directory/Folder** option to go to that page.

Introduction to Core FTP Pro - 5



The Remote Start Folder is where the MVS mailbox is located and should not be changed. However, you can choose the local folder where the downloaded files will be saved. Either type in the folder location directly or you can browse/select it by clicking the ellipse button ... by the field. You would click **OK** when done.

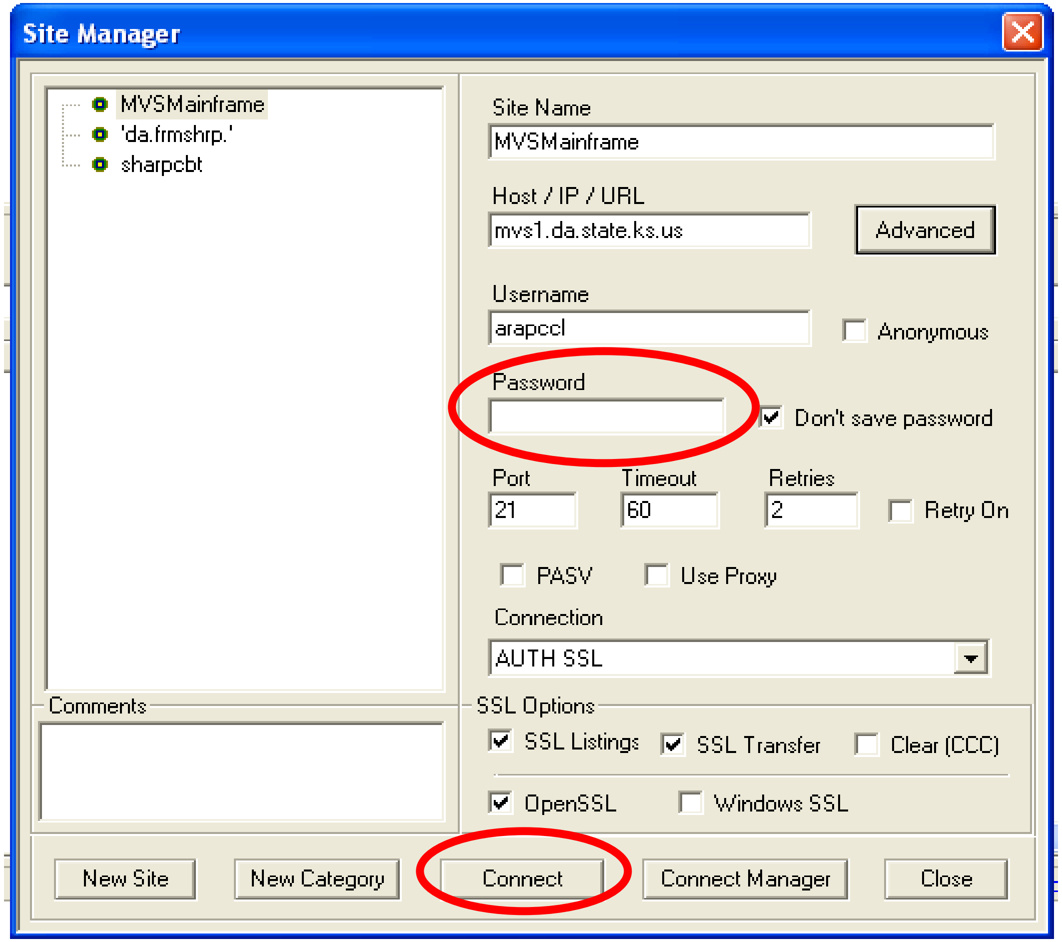
Changing Password in Core FTP Pro



The password must be changed every 30 days. You can change password at any time by typing the new and old passwords using the following format: oldpassword/newpassword/new password.

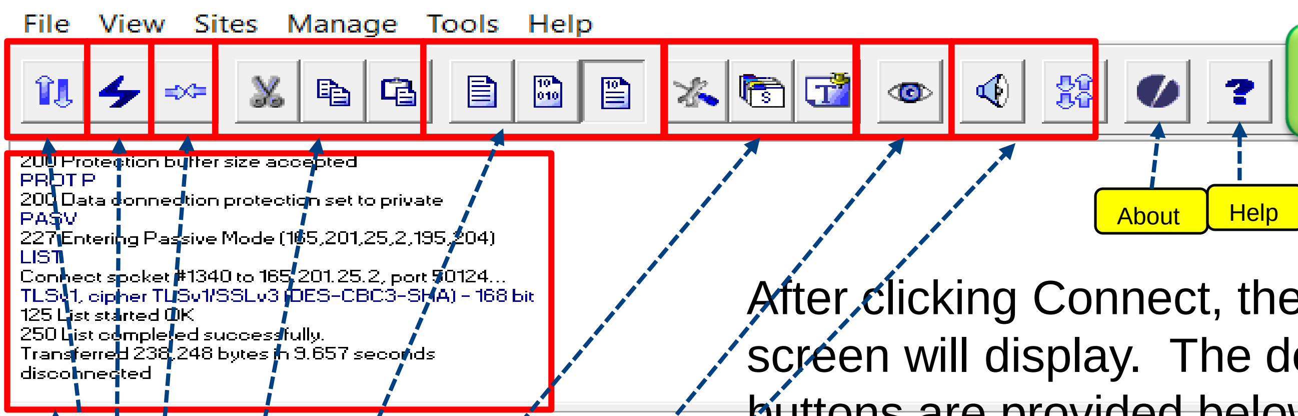
The password must be 8 characters long and <u>not</u> contain any special character or double character. Detailed instructions are available at: http://www.da.ks.gov/sharp/downloads.htm.

Download Reports Using Core FTP Pro - 1



The Site Manager page displays when you open Core FTP Pro. Type in your User Name (if not defaulted in) and **password**, then click the **Connect** button.

Download Reports Using Core FTP Pro - 2



This is the top half of the Local/Remote Site screen.

About

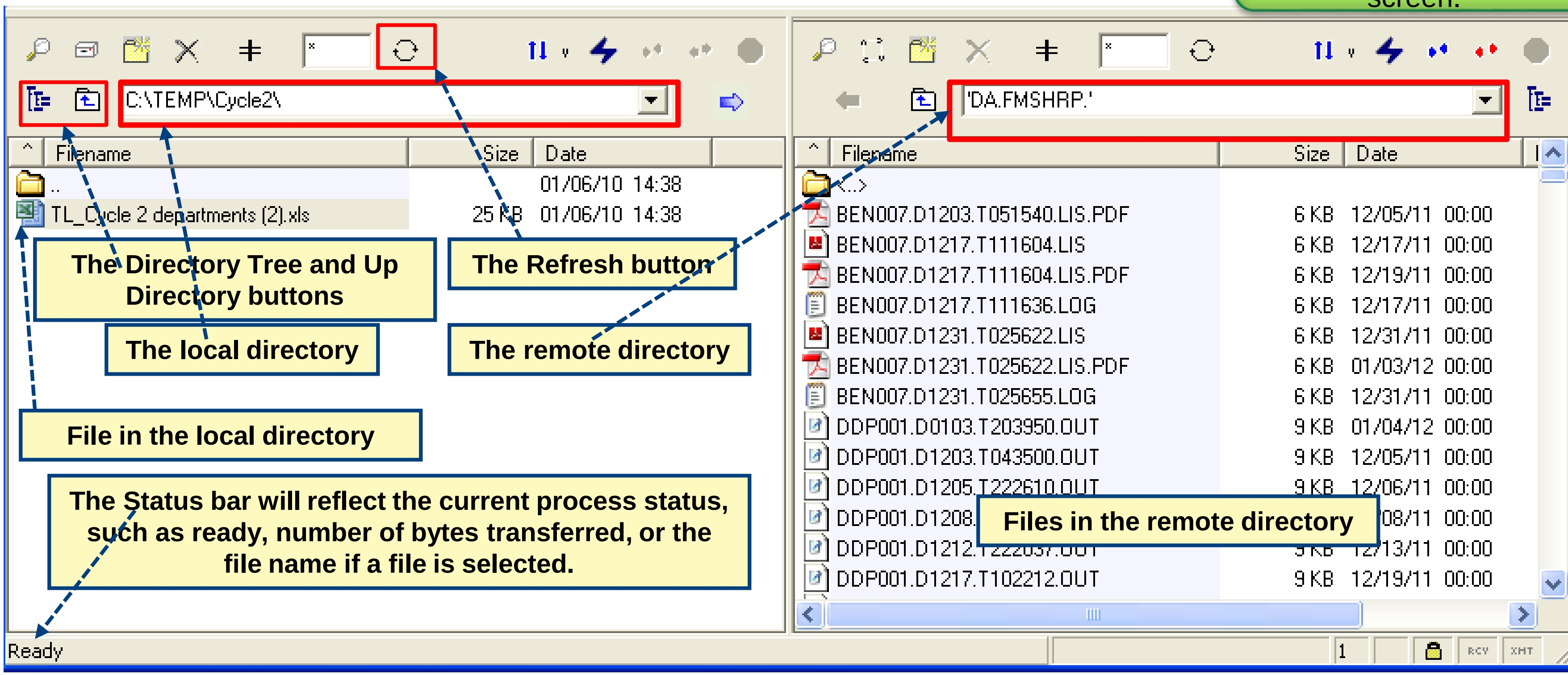
Help

After clicking Connect, the Local/Remote Site screen will display. The descriptions of the buttons are provided below.

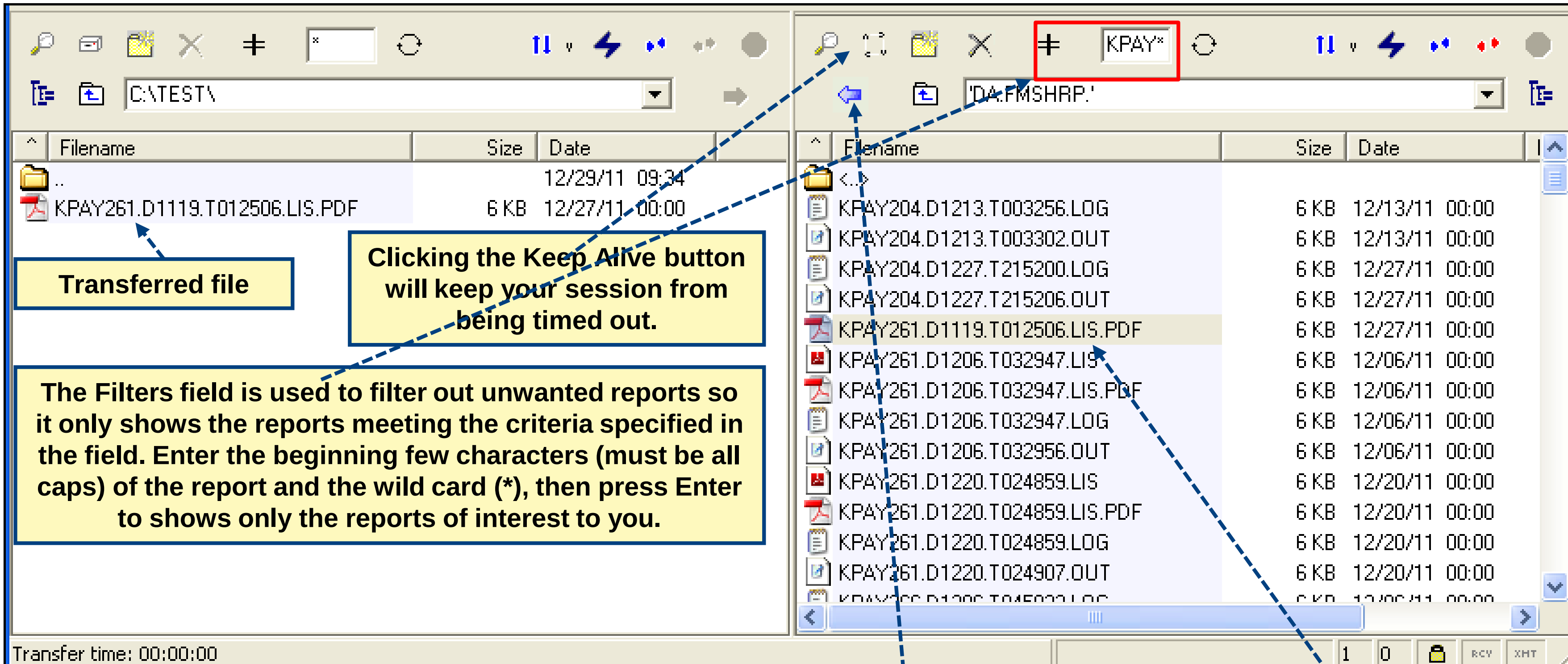
Site Manager: Clicking the button will display the Site Manager page where you can make changes or sign back onto the site if it becomes inactive.
Quick Connect: Clicking the button will pull up the Quick Connect window where you can connect to a different site.
Reconnect: Clicking the button will display the Password field for you to sign back into the inactive remote site.
The **Cut, Copy, and Paste** buttons are not used in file transfers.
Three modes, **Ascii, Binary, and Auto**, can be selected to transfer/view the selected file. If the report appears gibberish, it's possible the incorrect mode was selected.
The **Options, Sessions, Templates** buttons are used by the State.
Each time you click on the **Change View** button, the view will change through the 11 available display options.
The **Mute** and **Process Queue** buttons are not used.
Clicking the **About** button will display the software provider, version, and registration ID.
The **Help** button will link you to the Core FTP Pro help page.
The **message area** displays the results of your request or the status of filters, i.e., password error will say "530 PASS command failed".

Download Reports Using Core FTP Pro - 3

The bottom half of the Local/Remote Site screen.

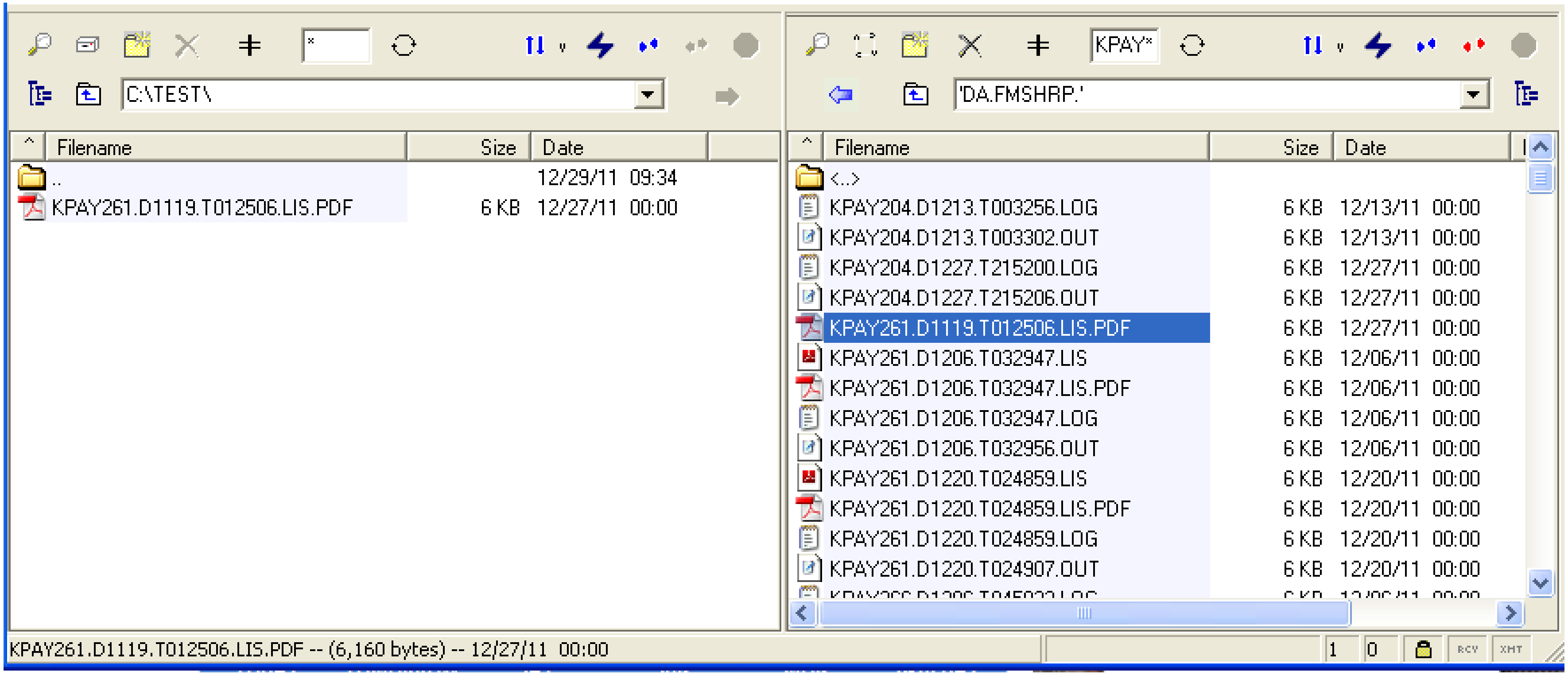


Download Reports Using Core FTP Pro - 4



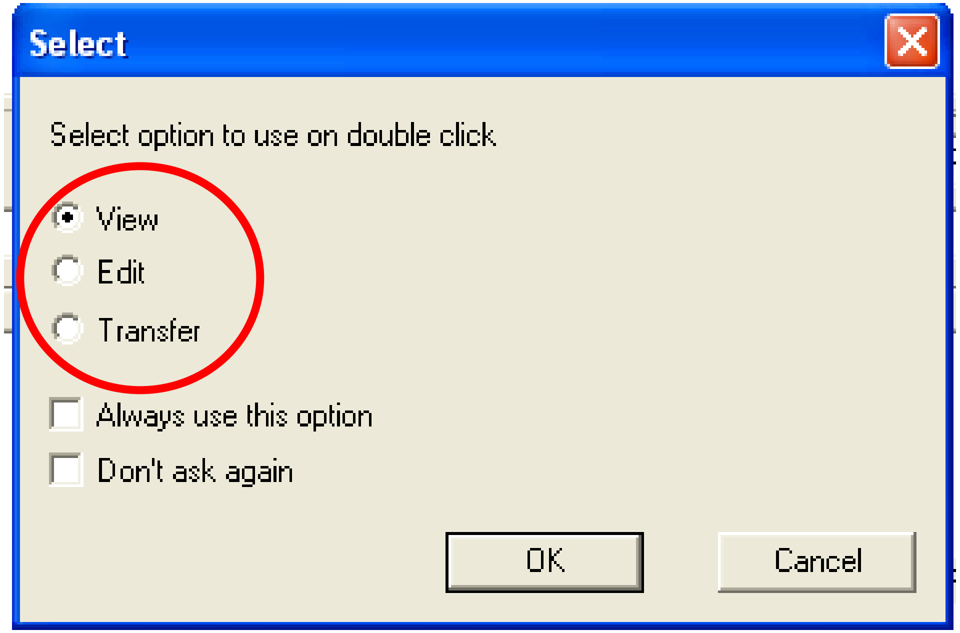
You can transfer the file from the remote site to your local folder by clicking to highlight the file in the remote site, then clicking the left arrow.

Download Reports Using Core FTP Pro - 5



You can also double click the highlighted file to see more options.

Download Reports Using Core FTP Pro - 6



After double clicking the file, several action options will display for you to select from. You can click the named radio button to view the report, edit the report if you have the appropriate software, or transfer the report to your designated local folder.

However, it's best to first save the original file to your local folder, then save the edited file under a different name.

Lesson Checkpoint

Now is your opportunity to ensure that you are learning the course material. After you read the question, make your selection, then compare your response to the correct answer provided at the bottom of the page.

Lesson Checkpoint

True or False? Centrally run reports can only be downloaded from the agency's MVS mailbox.

A) True
B) False

Correct answer is A

Lesson Checkpoint

Approximately how many days will a centrally run report be kept in the agency's MVS mailbox?

A) 30 days
B) Until transferred
C) Until deleted

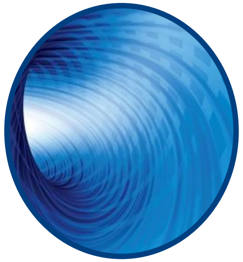
Correct answer is A

SHARP Reporting

Lesson Summary

There are three SHARP reporting methods: agency run reports, centrally run reports, and Workcenter queries. Agencies can request agency run reports directly from SHARP. Centrally run reports can only be downloaded from the agency's MVS mailbox using FTP software. You can also run queries from Payroll or Time and Labor Workcenters.

To request an agency run report, you must first add a Run Control ID and define the report parameters for the report.



Centrally run reports will stay in the agency MVS mailbox for approximately 30 days. The process for downloading centrally run reports is to move the report from the remote site (agency MVS mailbox) to the local site (your workstation).

In this lesson, I walked you through the basics of agency and centrally run reports, learning to download a report using Core FTP Pro. On the left are some key concepts covered in this lesson.

Course Completion

Congratulations! You have finished this course.